

Converting to Corporate One is easy as **1-2-3**. We have a team of departments dedicated to bringing credit unions online with our various products and services, including Share Drafts, Automated Capture and Exchange (ACE), ACH, Debit/Credit, Vault Services and MemberView®—Corporate One's online account management system. Our easy entry, personalized conversion process has been designed to meet the needs of credit unions small and large, and serve them over the long-term. This document will provide you an overview of this process.

**1**

### Complete agreements

Your credit union will begin by working with your Corporate One Marketing Representative to complete the needed agreements for the Corporate One products desired by your credit union.

**2**

### Implementation

Once your agreements are completed and returned to Corporate One, Brian Murphy, Assistant Vice President, will assign an Implementation Specialist to your credit union for each respective product or service you are utilizing. Your Implementation Specialist will contact you to determine and outline an implementation timeline that works best for your credit union. Your Implementation Specialist will be your credit union's main contact during this time. During implementation, your credit union will be technically set-up on the desired product, and your staff will also be trained thoroughly as to how to use the product to ensure your members are served successfully once your credit union is live on the product. Training on MemberView basics will also occur during implementation for those credit unions utilizing Corporate One's member account management system. Finally, your credit union will undergo comprehensive testing prior to moving to live production. Once your credit union has successfully completed testing, your Implementation Specialist will work with your credit union to determine a live production date.

**3**

### Live production

After moving into live production, your Implementation Specialist will assist you for the proceeding 30 days to ensure everything is running smoothly. At the end of those 30 days, your Implementation Specialist will hand you off to the Member Services department, which is led by Donna Williams, Manager of Member Services and Member Solutions, and comprised of more than nine professionals available to serve your credit union when the need arises. Donna and her team will be responsible for providing frontline member service to your credit union; answering questions, handling research requests and providing on-going guidance, as needed, on the relevant Corporate One products and services used by your credit union. You can contact Member Services by calling 866/MyCorp1.

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